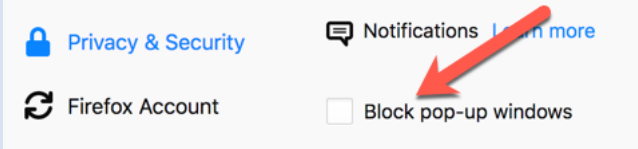
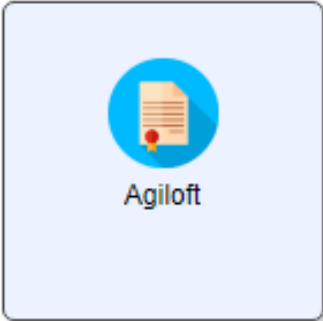
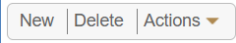


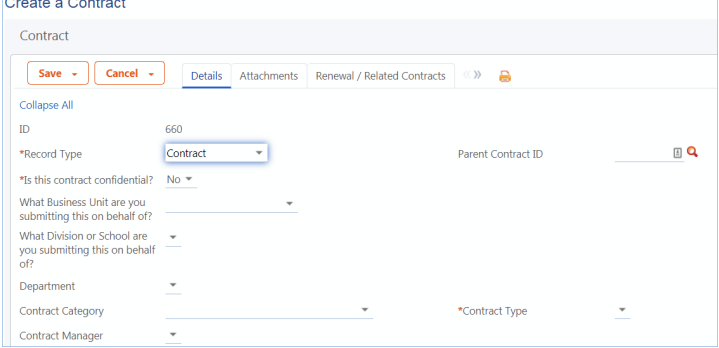
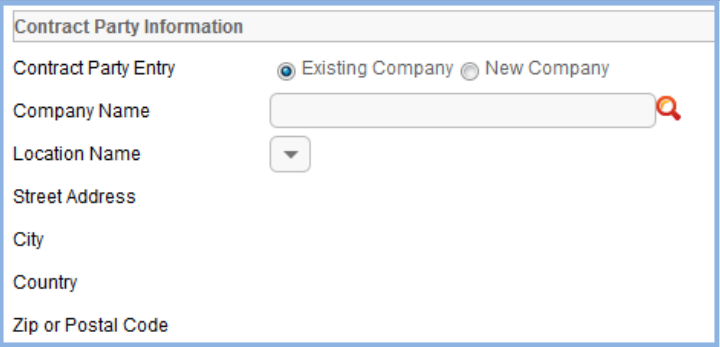


# Job Aid: How to Initiate a Contract

Steps	Visual Cues
<p><b>Enable Pop-ups:</b></p> <ol style="list-style-type: none"> <li>Firefox           <ol style="list-style-type: none"> <li>Firefox – Tools &gt; Options &gt; Content &gt; Block pop-up windows.</li> <li>Firefox – Preferences &gt; Privacy &amp; Security &gt; Block pop-up windows.</li> </ol> </li> <li>Chrome           <ol style="list-style-type: none"> <li>Chrome &gt; Preferences &gt; Advanced &gt; Content Settings &gt; Pop-ups and redirects &gt; Allowed</li> </ol> </li> </ol>	
<p><b>Login to Agiloft:</b></p> <ol style="list-style-type: none"> <li>Access the system from the myslu.slu.edu page with your existing credentials.</li> <li>From the Tools tab, choose the SLU Contracts icon to open Agiloft.</li> </ol>	
<p><b>Initiate New Contract:</b></p> <ol style="list-style-type: none"> <li>Click Contracts in the left pane, and then click New.</li> </ol> <p><b>Note:</b> Remember that in a browser-based application, you cannot click “Back.” Agiloft does not save records automatically. You can click “Save &amp; Continue” to save your work.</p>	
<p><b>Fill in Intake Request Form:</b></p> <ol style="list-style-type: none"> <li>Fill in all Intake Request Form Questions.</li> </ol> <p><b>Note:</b> Be sure to select all required fields, which are marked with a red asterisk *.</p> <p><b>Note:</b> If you see a magnifying glass  you can click it to look up the potential values in a new window. Be sure to enable pop ups in your browser in order to see that new window. When you see the value you want to pick, click the red arrow  to select the value and return to the intake form. In some cases, you may see checkboxes instead, and can check the box(es) and click “Import/Append.”</p>	

**Select Counterparty Company and Contact for Contract:**

5. Select whether the Counterparty is Existing in system or New to System.



Contract Party Information

Contract Party Entry  Existing Company  New Company

Company Name

Location Name



Street Address

City

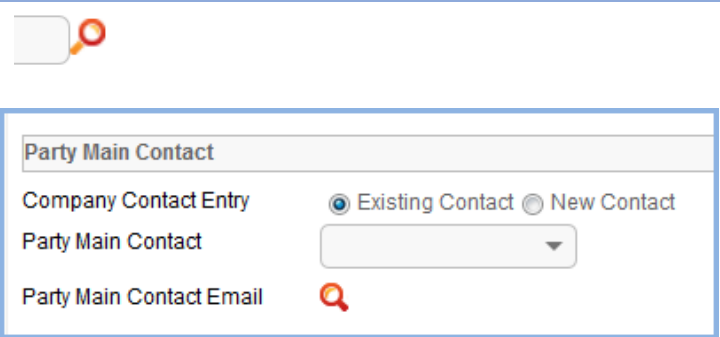
Country

Zip or Postal Code

**For Existing Company (previously entered into Agiloft):**

- 6. Click on lookup icon .
- 7. Search for company.
- 8. Select company and click red arrow  to select.

Once Existing Vendor is selected, choose the Party Main Contact from the dropdown menu.



Party Main Contact

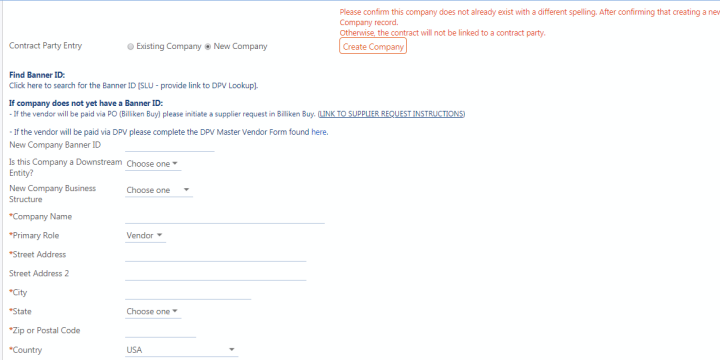
Company Contact Entry  Existing Contact  New Contact

Party Main Contact

Party Main Contact Email

**For New Company (not already in Agiloft):**

9. Enter New Company and Contact Information into the New Company and New Contact fields.



Contract Party Entry  Existing Company  New Company

Please confirm this company does not already exist with a different spelling. After confirming that creating a new Company record otherwise the contract will not be linked to a contract party.  
[Create Company](#)

**Find Banner ID:**  
Click here to search for the Banner ID (SLU - provide link to DPV Lookup).

**If company does not yet have a Banner ID:**  
- If the vendor will be paid via PO (Biller Buy) please initiate a supplier request in Biller Buy ([LINK TO SUPPLIER REQUEST INSTRUCTIONS](#))  
- If the vendor will be paid via DPV please complete the DPV Master Vendor Form found here.  
New Company Banner ID

Is this Company a Downstream Entity?

New Company Business Structure

\*Company Name

\*Primary Role

\*Street Address

Street Address 2

\*City

\*State

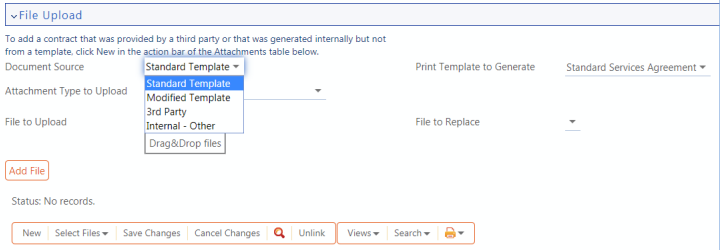
\*Zip or Postal Code

\*Country

**Upload Attachments:**

- 10. Choose Document Source (SLU template or 3<sup>rd</sup> party).
- 11. Use File Upload tool to add 3<sup>rd</sup> party contract as an attachment if applicable, and/or any other supplemental files.

Repeat as necessary.



File Upload

To add a contract that was provided by a third party or that was generated internally but not from a template, click New in the action bar of the Attachments table below.

Document Source  Standard Template  Print Template to Generate  Standard Services Agreement

Attachment Type to Upload

File to Upload

[Add File](#)

Status: No records.

[New](#) [Select Files](#) [Save Changes](#) [Cancel Changes](#) [Unlink](#) [Views](#) [Search](#) [Filter](#)

**Submit Contract Request:**

12. Click the Submit for Review button at the bottom of the form to submit the contract request and send it out for approval.



Submit for Review